



Financial Planning
Institute of Southern Africa

THE PROFESSIONAL STANDARD

2021
FINANCIAL PLANNER
OF THE YEAR ENTRY
FORM

NB: Please read the 2021 Financial Planner of the Year Competition Guide before completing the entry form as this contains important information about the competition and process.

Entrant Details

Personal details

Title: _____ Surname: _____

First name (s): _____

ID number: _____

Professional Designation (CFP® professional): _____

Membership Number: _____

Email: _____

Physical address: _____

_____ Postal code: _____

Telephone (W): _____ Cell: _____

warrant that all information provided in this entry form is true and correct.

Signed at _____ on _____ 2021.

I, _____ hereby acknowledge the terms and conditions of the 2021 Financial Planner of the Year competition and undertake to adhere to them. By entering the competition I consent to FPI conducting a full background and reference check on me in its sole discretion

Accept

Practice Details

1. Company name: _____
 2. Nature of your practice: _____
 3. What is the ownership structure in your practice (for example; owner, employee, agent)?
 4. FSP licence number: _____
 5. Licence categories:
 6. What services do you offer your clients (estate and trust planning, investment planning, risk planning, retirement planning, health care planning or tax planning)?
 7. How many clients do you have as at 31 December 2020? _____
 8. If you provide investment advice, what were your funds under management as at 31 December 2020?
 9. What outsourced agreements for services do you have in your practice?
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Your Career

1. Detail your career profile, including years of experience.
 2. What are your achievements or awards have you won (industry, company, membership bodies)?
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Professional Involvement

1. Are you a member of any industry committees/bodies? _____

2. Are you involved in any financial literacy education, charity fundraising initiatives or any other consumer or education activities? If so, please provide details:

3. Do you participate in the media to promote financial planning to consumers (articles, broadcast media)? If so, please provide details:



Additional Questions

1. Please provide a comprehensive narrative on your understanding of the role of a financial planner?

2. Please provide as statement as you why you entered this competition?
